



# **IDP for Supervisors**

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## **Module 3: Finalize Phase Responsibilities**



## What Is Your Role in the Finalize Phase?

After the employee has created a draft IDP in SATERN, one of the supervisor's primary responsibilities is to review and approve the IDP. This module will discuss the variety of tasks involved in the **Finalize** phase.

This module will cover the following tasks:

- Reviewing a Draft IDP with the Employee
- Recognizing IDP Submissions for Approval
- Selecting an IDP for Review
- Viewing Plan Details
- Making Comments
- Rejecting an IDP
- Approving an IDP





## Review a Draft IDP with the Employee

The first step involved in finalizing an IDP is to meet with the employee to review the draft IDP before it is submitted for your approval.

The purpose of this meeting is to:

- Ensure that the supervisor and employee are in agreement regarding specific goals and development activities
- Provide the employee with an opportunity to ask questions or seek clarification
- Discuss any relevant topics that may not have been raised in the initial supervisor meeting
- Offer suggestions for further ways to reach the employee's goals





## Recognize IDP Submissions for Approval

When an employee submits an IDP for your review, you will receive an email notification. The email will be from **NASA-saturn** and the subject line will read: **SATERN IDP Review**

The email will instruct you to log in to SATERN to review the IDP.

**From:** <[NASA-saturn@nasa.gov](mailto:NASA-saturn@nasa.gov)>  
**Date:** Wed, 24 Feb 2010 13:53:00 -0600  
**To:** "Hubbard, Robert J. (KSC-BAE00)." <[robert.j.hubbard@nasa.gov](mailto:robert.j.hubbard@nasa.gov)>  
**Subject:** SATERN IDP Review

MYERS, JENNIFER F has submitted a new Plan. This new plan (Systems Engineering) is for MYERS, JENNIFER F and requires your Review and Approval. Please log in to SATERN and review this IDP as soon as possible. Contact your supervisor if you have any questions.

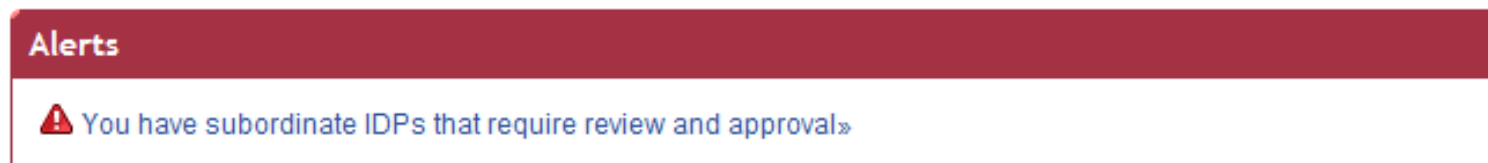




## Select an IDP for Review

When you log in to SATERN, you will see an **Alert** in red box that there is an IDP waiting for your review.

Click this link to be directed to a list of all IDPs awaiting your review and approval.



Click the **Alert** text.





## Select an IDP for Review (cont.)

Choose the plan you wish to review.

The screenshot shows a web application interface for Performance Management. At the top, there are two tabs: 'Performance Management (1)' and 'Training (0)'. Below the tabs is a section titled 'Performance Management' with a sub-section 'Subordinate Plan Approvals (1)'. Under this, there is a 'Review Subordinate' section containing a table. The table has columns for 'User Name', 'IDP Title', 'IDP Period', 'IDP Status', 'Effective Date', 'Approval Date', 'Expiration Date', 'Review Type', and 'Action'. A single row of data is visible for 'SHUKLIN, SOPHIA' with a 'Review' button in the 'Action' column, which is circled in green.

User Name	IDP Title	IDP Period	IDP Status ▲	Effective Date	Approval Date	Expiration Date	Review Type	Action
SHUKLIN, SOPHIA	Mechanical Engineering	Performance Year 2009 (3 year)	Submit/Pending	5/1/2009		4/30/2010	New Plan	<a href="#">Review</a>

Click **Review**.

Clicking **Review** brings you into the employee's plan in the **View/Add Notes** mode. Before moving forward to review the IDP, be sure to orient yourself.





## Select an IDP for Review (cont.)

You can see whose plan you are viewing at the top of the page. Here you are **Viewing: Sophia Shuklin**. If you need to return to your own records, click **[Return to Org Chart]** link, and then click on any tab. If you need to return to other employees plans, click **Personal tab > Approvals**.

The screenshot shows the SATERN IDP system interface. At the top, there are four tabs: Personal, Learning, Career, and Reports. The 'Personal' tab is selected. Below the tabs, a box displays 'Viewing: SOPHIA SHUKLIN' and 'No Job Position Title' with a link to '[Return to Org Chart]'. This box is circled in green. Below this, the 'My IDPs and Goals' section is visible, containing details about the current IDP, including title, period, purpose, status, and dates. At the bottom, there is a table of goals for the 'Basics of Engineering' section.

Goal Name	Target Date	Priority	Percent Toward Target	Action	Remove
Basics of Engineering	1/22/2010	For mission objectives/job requirements		View/Add Notes	







# View Plan Details

To see the development activities listed under each goal, click the ► symbol to expand that section.

Development

Title: 

Add Description

Group By: 

Section ▼

Field Chooser

New Goal

▼ Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)

Goal Name ▲	Target Date	Priority	Percent Toward Target	Action	Remove
► Develop pe...	9/30/2012	Improve skill set/may not be current job		<div>View/Add Notes</div> <div>Move Goal</div> <div>Edit</div>	<div>✕</div>







## Make Comments

Once you have viewed the IDP, you can add comments to any goal, activity, and/or the plan as a whole.

To add notes, click the **View/Add Notes** button next to the section on which you'd like to comment.

The screenshot shows a web interface for an Individual Development Plan (IDP). At the top, a section header reads "Section Name: MID-RANGE GOALS: 2 - 4 YEARS(1)". Below this is a table with columns: Goal Name, Target Date, Priority, Percent Toward Target, Action, and Remove. The first row shows a goal: "Develop people management skills" with a target date of "9/30/2012" and priority "Improve skill set/may not be current job". The "View/Add Notes" button in the Action column is circled in green. Below the goal table, a "Details" section is expanded, showing "Activities (1)". This section has a table with columns: Name, Due Date, Type, Priority, Target / Stretch, Action, and Remove. The first activity is "Leadership development assignment" with a due date of "9/30/2012" and type "External Activities (Activities Not in the Catalog such as Academic Courses, Conferences, and Seminars)". The "View/Add Notes" button in the Action column is also circled in green. A green arrow points from a text box below to the "View/Add Notes" button in the activities table. Another green arrow points from the "View/Add Notes" button in the goal table to the same button in the activities table.

Click **View/Add Notes**.

Prepare

Create

Finalize

Manage



## Make Comments (cont.)

The **Notes** page allows you to view any comments that have already been added to the selected section.

Notes can be made by the employee, supervisor, or by a coach or mentor. To add notes, type the text in the box provided and click **Add**. If you choose not to add notes, you can exit by clicking **Back** at the top of the screen.

The screenshot shows a web interface with two main sections. The top section, 'Add Notes', has a blue header bar. Below it is a text input field labeled '\* Notes:'. To the right of the input field is a green callout box with the text 'Enter comments.' and a green arrow pointing to the input field. Below the input field is a checkbox labeled 'This is a private note.' To the right of the checkbox is another green callout box with the text 'Click Add.' and a green arrow pointing to a grey 'Add' button, which is circled in green. The bottom section, 'Review Notes', has a blue header bar. Below it is a text area containing the text 'Supervisor, BLISS, STEVEN D - 12/8/2009 04:08 PM EST' and 'I WAS logging on to approve this when I got your email... so now I'm rejecting.' To the right of this text area is a green callout box with the text 'View comments.' and a green arrow pointing to the text area.

Checking **This is a private note.** will ensure that others with access to this plan cannot view your notes (including your mentee), but they are recorded in the system and are not truly “private.”





## Reject an IDP

If, after reviewing, there are further changes that need to be made (e.g., a course you discussed with the employee was not included in the plan), you can reject the IDP.

The employee will have the opportunity to revise the plan and resubmit.

The screenshot shows the SATERN IDP system interface. At the top, there are four tabs: Personal, Learning, Career, and Reports. Below the tabs, it says "Viewing: SOPHIA SHUKLIN" and "No Job Position Title" with a link "[Return to Org Chart]". The main section is titled "My IDPs and Goals" and contains a paragraph of instructions. Below this, there are several fields: "IDP Title : Mechanical Engineering (Select Other IDP)", "IDP Period : Performance Year 2009 (3 year)", "IDP Purpose : Certification", "IDP Status : Submit/Pending (Submitted for approval on 12/18/2009)", "Version : 0 (current)", "Effective Date: 5/1/2009", and "Expiration Date: 4/30/2010". At the bottom right, there are five buttons: "Print IDP", "List all IDPs", "View/Add Notes", "Approve", and "Reject". The "Reject" button is circled in green.

Click **Reject**.





## Reject an IDP (cont.)

If you choose to reject a plan, you are required to provide comments regarding the reason for the rejection.

To enter your comments, type your text into the box provided. Comments should be specific enough to guide employee revisions. Once complete, click **Reject**.

A screenshot of a web form titled "Add IDP Review Notes". The form has a text area for notes. A green arrow points from a box labeled "Enter comment." to the text area. Another green arrow points from a box labeled "Click **Reject**." to a "Reject" button, which is circled in green. The text area contains the following text: "hi Sophie, I am going to reject your plan because I do not see the specifics that will support your overall development. Please modify the activities to reflect how you plan on achieving your certificate. Then resubmit it to me. Also, please take an introductory class to engineering before making your changes".

Add IDP Review Notes

\* Notes: hi Sophie,  
I am going to reject your plan because I do not see the specifics that will support your overall development. Please modify the activities to reflect how you plan on achieving your certificate. Then resubmit it to me. Also, please take an introductory class to engineering before making your changes

Enter comment.

Click **Reject**.




Reject





## Reject an IDP (cont.)

Once you have entered comments and clicked **Reject**, you will see that the **IDP Status** is now listed as **Rejected**. An email notifying the employee of the rejection will be sent automatically. The employee will then be able to modify the plan and resubmit.

Personal	Learning	Career	Reports									
<div>Viewing: SOPHIA SHUKLIN No Job Position Title <a href="#">[Return to Org Chart]</a></div>												
<h3>My IDPs and Goals</h3> <p>The details of this IDP are shown below. You may add or edit goals to the IDPs. You may add or edit supporting activities for those goals. You must submit the IDP for approval. Once your IDP is approved by your supervisor, you will be allowed to update the status of goals and activities. You may view or add notes to this IDP at any time. To select another IDP, hover your mouse over the image by the side of the current IDP title and select a different IDP. If you have been designated as a Coach, you may view, update, or add other users' IDPs.</p> <p>* = Required Fields</p> <table><tr><td>IDP Title : Mechanical Engineering (Select Other IDP)</td><td>IDP Period : Performance Year 2009 (3 year) <a href="#">Select</a> <a href="#">Clear</a></td><td rowspan="4"> This IDP contains changes that have not been approved.</td></tr><tr><td>IDP Title : Mechanical Engineering</td><td>IDP Purpose : Certification</td></tr><tr><td>IDP Status : Rejected</td><td>Version : 0 (current)</td></tr><tr><td>Effective Date : 3/1/2009</td><td>Expiration Date : 4/30/2010</td></tr></table> <div><a href="#">Print IDP</a> <a href="#">List all IDPs</a> <a href="#">View/Add Notes</a> <a href="#">Save</a> <a href="#">Submit for Approval</a></div>				IDP Title : Mechanical Engineering (Select Other IDP)	IDP Period : Performance Year 2009 (3 year) <a href="#">Select</a> <a href="#">Clear</a>	 This IDP contains changes that have not been approved.	IDP Title : Mechanical Engineering	IDP Purpose : Certification	IDP Status : Rejected	Version : 0 (current)	Effective Date : 3/1/2009	Expiration Date : 4/30/2010
IDP Title : Mechanical Engineering (Select Other IDP)	IDP Period : Performance Year 2009 (3 year) <a href="#">Select</a> <a href="#">Clear</a>	 This IDP contains changes that have not been approved.										
IDP Title : Mechanical Engineering	IDP Purpose : Certification											
IDP Status : Rejected	Version : 0 (current)											
Effective Date : 3/1/2009	Expiration Date : 4/30/2010											





## Approve an IDP

If you have reviewed the draft IDP and agree with the proposed goals and development activities, click **Approve**. You can approve an IDP the first time it is submitted, or you can approve the document after an initial rejection (once revisions have been made and the plan has been resubmitted for approval).

The screenshot shows a web application interface with a top navigation bar containing four tabs: 'Personal', 'Learning', 'Career', and 'Reports'. Below the tabs, a yellow box displays 'Viewing: SOPHIA SHUKLIN' and 'No Job Position Title' with a link '[Return to Org Chart]'. The main section is titled 'My IDPs and Goals' and contains instructional text. Below this, IDP details are listed: 'IDP Title : Mechanical Engineering (Select Other IDP)', 'IDP Period : Performance Year 2009 (3 year)', 'IDP Purpose : Certification', 'IDP Status : Submit/Pending (Submitted for approval on 12/18/2009)', 'Version : 0 (current)', 'Effective Date: 5/1/2009', and 'Expiration Date: 4/30/2010'. At the bottom right, a row of buttons includes 'Print IDP', 'List all IDPs', 'View/Add Notes', 'Approve', and 'Reject'. The 'Approve' button is circled in green.

Click **Approve**.







## Approve an IDP (cont.)

The **Plan Status** will now read **Active/Approved**.

The employee will receive an email indicating that the IDP has been approved. On the IDP's **Effective Date**, the employee will receive a second email indicating that the IDP is active.

Personal	Learning	Career	Reports
<div>Viewing: SOPHIA SHUKLIN No Job Position Title <a href="#">[Return to Org Chart]</a></div>			
<h3>My IDPs and Goals</h3> <p>The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.</p> <div><div>IDP Title : Mechanical Engineering (Select Other IDP)</div><div>IDP Period : Performance Year 2009 (3 year)</div><div>IDP Purpose : Certification</div><div><div>IDP Status : Active/Approved (Expires 132 days from now) ▶</div><div>Version : 1 (current) ▼</div></div><div><div>Effective Date: 5/1/2009</div><div>Expiration Date: 4/30/2010</div></div></div> <div><div>Print IDP</div><div>List all IDPs</div><div>View/Add Notes</div></div>			







## Return to Your Documents

Once you have approved the plan, you can exit the employee's plan. To do this, click [\[Return to Org Chart\]](#) link. Then click on any tab.

Personal	Learning	Career	Reports
<div>Viewing: SOPHIA SHUKLIN No Job Position Title <a href="#">[Return to Org Chart]</a></div> <h3>My IDPs and Goals</h3> <p>The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.</p> <div><div>IDP Title : Mechanical Engineering (Select Other IDP)</div><div>IDP Period : Performance Year 2009 (3 year)</div><div>IDP Purpose : Certification</div><div>IDP Status : Active/Approved (Expires 132 days from now) ▶</div><div>Version : 1 (current) ▼</div><div>Effective Date: 5/1/2009</div><div>Expiration Date: 4/30/2010</div></div> <div><a href="#">Print IDP</a> <a href="#">List all IDPs</a> <a href="#">View/Add Notes</a></div>			

